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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

APRIL, 1991

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR FORCE DEVELOPMENTS

During April, Maryland's unemployment rate dropped below the 6.0 percent mark for the first time in four months, suggesting that the recession may very well be losing momentum. As employment rose, the jobless count declined, lowering the statewide jobless rate from 6.0 percent in March to 5.6 percent in April. Labor market conditions improved throughout the state, with twenty-one of Maryland's local jurisdictions reporting jobless declines.

Nationally, the unemployment rate, while declining by a greater 0.6 percentage points to 6.5 percent, remained well above the statewide estimate during April.

Employment among Maryland residents rose by just over 30,200 to 2,392,667 in April. While there are fewer persons employed this year than there were in April 1990, the current employment increase is the highest on record for the month since 1986. April's employment gain far exceeded the expansion in the labor force, resulting in a decline of nearly 8,000 in the number of unemployed workers over the month. This unemployment decline, coupled with reports of reduced claims activity at local unemployment offices, further suggests that the effects of the recession are subsiding.

	April 1991	March 1991	April 1990
Civilian Labor Force	2,534,351	2,512,124	2,520,365
Total Employment	2,392,667	2,362,455	2,430,045
Total Unemployment	141,684	149,669	90,320
Unemployment Rate	5.6	6.0	3.6
National Unemployment Rate	6.5	7.1	5.2

While activity in Maryland's job market during March and April has upgraded the status of many workers by raising employment by nearly 62,800 and reducing unemployment by just over 19,100, the deterioration wreaked by the recession is far from repaired. April's jobless rate, while improved, is still substantially higher than last year's rate of 3.6 percent when a much smaller 90,320 persons were unemployed and a greater 2,430,045 persons were employed.

INDUSTRY DEVELOPMENTS

Seasonal employment patterns prevailed during April. With the exception of finance and government, employment levels rose in all industry lines. About 9,100 jobs were added to Maryland's industry payrolls during April, raising employment to 2,160,700. Although substantial in light of recent economic conditions, this increase in jobs fell short of anticipated expansion. Last April, the seasonal upswing in employment lifted industry payrolls by about 13,800 jobs. As has been the case in recent months, the current job count remains nearly 14,000 below last year's level.

About 45.0 percent of April's job gains resulted from hiring activity in the goods-producing industries. The construction industry continued to recoup some of its recessionary losses, adding another 3,500 jobs over the month. General building contractors, still faced with a sluggish market, pulled the reins on their normal hiring practices, adding a mere 400 jobs during April. Hiring in special trades and among heavy contractors, however, uplifted the industry's performance with a combined increase of about 3,100 jobs over the month.

Employment in Maryland's factories rose by about 400 jobs during April, reversing a six month string of job declines. Growth in the manufacturing sector was confined solely to the durable goods component, with hiring and recall activity in stone products and primary metals supporting this gain. Those workers employed in the manufacturing industry found themselves working slightly shorter workweeks and earning smaller paychecks during April. Overall, in manufacturing, a reduction in overtime hours cut work schedules to 40.2 hours and lowered weekly earnings by about $2.00 to $473.56 in April. In durable goods, while workweeks remained the same, a drop in hourly earnings brought weekly earnings down by $1.67 to $519.99. Within durable goods, trends were mixed. The most noteworthy movement occurred in instruments manufacturing where work schedules were reduced by nearly 1.5 hours and weekly earnings dropped sharply, by $27.51, to $564.90. In nondurable goods, working an average of 38.8 hours yielded a weekly paycheck of $432.62 in April, down from March's 39.0 hour paycheck of $435.24. In printing and publishing where the average workweek fell by just over 1.0 hour to 36.4 hours, weekly earnings tumbled down by more than $16.00 to $482.30. Even with this decline, workers in print shops are earning about $.50 more per hour this year than they did in April 1990.

Among Maryland's service providers, trade and services turned in the best performances. In trade, seasonal hiring in restaurants and at building supply/hardware stores helped to compensate for declines at general merchandise, home furnishings and food stores. The services industry, which contributed about 25.0 percent of all new jobs during April, reported payroll additions in agricultural services, hotels, amusements and business services. Elsewhere on industry payrolls, hiring was noted in communications, water transportation and real estate. On the flip side, layoffs were reported by depository institutions, insurance carriers, engineering services and at federal defense installations. Payrolls in local government also tumbled as elementary and secondary schools began their spring vacations.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
APRIL 1991

Industry	April 1991	March 1991	April 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,160.7	2,151.6	2,174.6
Goods Producing	355.4	351.3	369.9
Mining	2.2	2.0	2.1
Construction	154.1	150.6	161.0
Heavy Construction	18.7	17.4	19.4
Manufacturing	199.1	198.7	206.8
Durable Goods	103.2	102.6	110.4
Lumber & Wood Products	4.0	3.9	4.1
Stone, Clay, & Glass Products	8.4	8.0	8.7
Concrete, Gypsum, Plaster	5.2	5.1	5.4
Other Stone, Clay, & Glass	3.2	2.9	3.3
Primary Metal Industries	10.4	10.1	10.8
Blast Furnaces	8.7	8.4	9.0
Fabricated Metal Products	9.8	9.8	9.8
Fabricated Structural Metal Products	4.1	4.1	4.2
Other Fabricated Metal Products	4.6	4.6	4.5
Industrial Machinery	15.8	15.8	16.8
Refrigeration & Service Mach.	2.2	2.2	2.4
Other Industrial Machinery & Equipment	9.4	9.4	9.7
Electronic Equipment	14.6	14.7	16.1
Communications Equipment	4.3	4.3	4.4
Electronic Component	3.6	3.7	4.2
Other Electronic Equipment	6.7	6.7	7.5
Transportation Equipment	12.3	12.5	14.1
Motor Vehicles	5.1	5.2	5.7
Other Transportation	2.7	2.7	3.4
Instruments & Related	22.3	22.2	24.4
Miscellaneous Manufacturing	2.7	2.7	2.7
Nondurable Goods	95.9	96.1	96.4
Food & Kindred Products	24.7	24.8	24.0
Meat Products	5.9	6.1	5.6
Beverages	4.2	4.2	4.3
Other Food & Kindred	9.8	9.8	9.6
Textile Mill, Apparel	9.8	9.8	10.1
Paper & Allied Products	9.6	9.6	9.4
Printing & Publishing	27.9	28.1	28.7
Chemicals and Allied Products	13.7	13.7	13.8
Rubber & Miscellaneous	8.2	8.1	8.3
Other Nondurable Goods	2.0	2.0	2.1

Industry	April 1991	March 1991	April 1990
Service Producing	1,805.3	1,800.3	1,804.7
Transportation & Public Utilities	101.8	101.6	101.5
Transportation	57.1	57.0	57.2
Railroad Transportation	4.4	4.4	4.7
Trucking & Warehousing	29.2	29.4	28.6
Communications & Utilities	44.7	44.6	44.3
Communications	28.3	28.2	28.1
Electric, Gas, Sanitary	16.4	16.4	16.2
Trade	522.2	517.5	526.9
Wholesale Trade	108.1	108.1	109.2
Retail Trade	414.1	409.4	417.7
Building Materials, Garden Supplies	18.0	17.0	18.0
General Merchandise	42.6	42.7	43.8
Food Stores	66.1	66.2	64.9
Eating & Drinking Places	132.8	129.0	133.5
Finance, Insurance, & Real Estate	130.3	130.7	131.3
Finance	56.9	57.2	58.8
Depository Institutions	41.9	42.1	43.0
Commercial Banks	27.0	27.1	27.8
Insurance	39.0	39.2	38.3
Insurance Carriers	25.9	26.1	25.2
Real Estate	34.4	34.3	34.2
Services	625.3	623.2	619.6
Business Services	134.1	133.2	135.0
Health Services	162.3	162.3	156.8
Hospitals	79.8	80.0	77.0
Legal Services	15.9	15.9	15.8
Educational Services	37.1	37.2	36.9
Private Colleges, Universities	19.5	19.6	19.2
Total Government	425.7	427.3	425.4
Total Federal Government	132.1	132.5	134.8
Department of Defense	47.0	47.4	46.8
Other Federal Government	85.1	85.1	88.0
Total State & Local Government	293.6	294.8	290.6
Total State Government	101.1	101.3	99.8
State Education	34.8	34.8	33.2
Other State Government	66.3	66.5	66.6
Total Local Government	192.5	193.5	190.8
Local Education	116.5	118.0	116.1
Other Local Government	76.0	75.5	74.7

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
APRIL 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	April 1991	March 1991	April 1991	March 1991	April 1991	March 1991
MARYLAND						
Manufacturing	40.2	40.3	$473.56	$475.54	$11.78	$11.80
Durable Goods	41.8	41.8	519.99	521.66	12.44	12.48
Lumber and Wood Products	38.8	38.7	348.42	344.43	8.98	8.90
Stone, Clay, and Glass Products	44.0	42.8	496.76	487.06	11.29	11.38
Primary Metal Industries	41.2	42.1	670.74	686.65	16.28	16.31
Blast Furnaces	41.5	42.5	684.75	705.50	16.50	16.60
Fabricated Metals	40.5	40.7	429.71	426.54	10.61	10.48
Industrial Machinery	42.3	42.7	544.82	552.11	12.88	12.93
Electronic Equipment	45.5	46.2	421.79	439.82	9.27	9.52
Transportation Equipment	39.8	38.6	638.39	616.44	16.04	15.97
Instruments and Related Products	42.0	43.4	564.90	592.41	13.45	13.65
Miscellaneous Manufacturing Industries	40.0	39.1	384.00	373.41	9.60	9.55
Nondurable Goods	38.8	39.0	432.62	435.24	11.15	11.16
Food and Kindred Products	39.1	39.1	407.42	404.29	10.42	10.34
Textile Mill, Apparel	35.1	34.8	265.36	264.48	7.56	7.60
Paper and Allied Products	42.0	41.8	504.00	495.33	12.00	11.85
Printing and Publishing	36.4	37.5	482.30	498.75	13.25	13.30
Chemicals and Allied Products	41.3	41.2	520.38	517.06	12.60	12.55
Rubber and Plastic Products	42.0	42.5	411.60	422.88	9.80	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing	40.8	40.7	$498.98	$497.35	$12.23	$12.22
Durable Goods	41.9	41.7	550.99	547.10	13.15	13.12
Nondurable Goods	39.6	39.7	445.50	448.21	11.25	11.29

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

The Baltimore Metro Area hosted over 80.0 percent of the statewide jobless decline during April. With nearly 6,700 fewer workers counted among the unemployed, the jobless rate in the region tumbled by 0.6 percentage points to 6.2 percent. Employment rose and unemployment declined in each of the region's local jurisdictions. In both Carroll and Queen Anne's counties, unemployment rates dropped by more than a full percentage point to 5.5 percent and 4.9 percent, respectively. Baltimore City's rate, while the highest in the region, declined from 9.3 percent to 8.6 percent as more than 2,200 workers moved from the unemployment to the employment rolls. Seasonal hiring added about 5,600 jobs to the BMA's industrial payrolls over the month. The construction and trade industries, when combined, accounted for nearly two-thirds of the overall industrial gain. In construction, heavy contractors turned in the best showing while, in trade, eating and drinking establishments were the primary job suppliers.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. Suburbs, a modest decline of 0.1 percentage points lowered the regional jobless rate to 4.0 percent in April. Unemployment declined throughout the region with the exception of Prince George's County where the jobless rate held steady at 4.4 percent. Labor market conditions in Calvert and Frederick, the suburban counties hardest hit by the recession, improved noticeably. While continuing to top the statewide average, the jobless rate in Calvert fell by 0.6 percentage points to 6.7 percent and, in Frederick, an even greater decline of 0.9 percentage points lowered unemployment to 6.0 percent. In Frederick, while rising employment was a key factor in reducing unemployment, a shrinkage in the labor force also contributed to the county's jobless decline. During April, renewed hiring in the construction industry provided the primary source of new job opportunities for area residents.

WESTERN MARYLAND

Western Maryland's job market moved ahead in April, easing the unemployment burden carried by area jobseekers. The region's jobless rate, which peaked at 13.1 percent in February, fell below 9.0 percent for the first time in six months. Unemployment in the western region, while remaining the highest in the state, improved considerably, dropping from 9.8 percent in March to 8.8 percent in April. Employment in the region rose by slightly more than 2,300 in April while unemployment declined by 935 persons. The benefit of this employment expansion was evident throughout the region, causing jobless rates to drop back in each of the western counties. The largest decline, from 11.7 percent to 10.5 percent, occurred in Garrett County. The region's industrial payrolls rose by about 900 jobs during April, with increased hiring reported by almost every industry line. The construction industry turned in the best performance, followed by manufacturing and government.

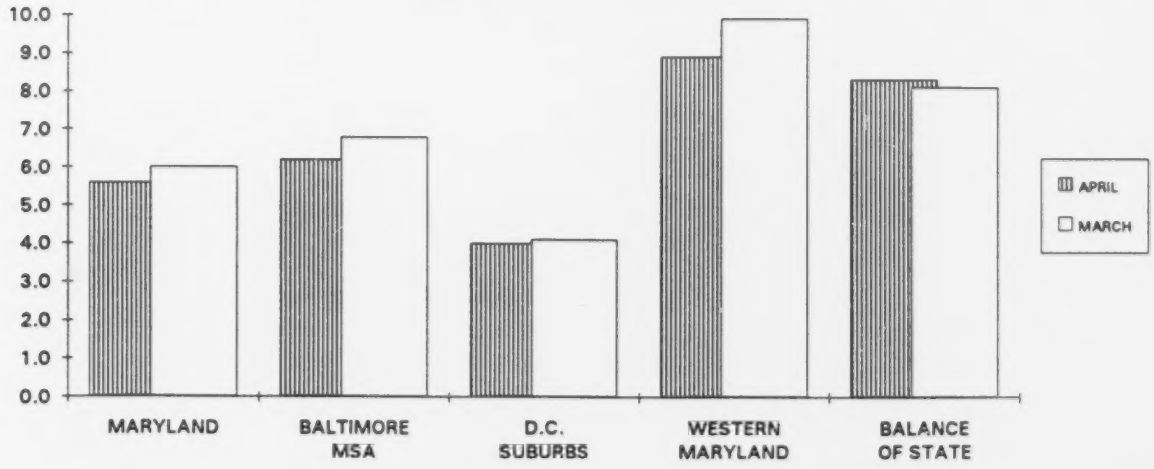
BALANCE OF STATE

On the Eastern Shore and in Southern Maryland, jobless increases in Cecil and Wicomico counties pushed the regional rate up from 8.1 percent to 8.3 percent. In Cecil, the only county in the region to show an absolute employment decline, continued layoffs in Delaware's auto industry increased the county's unemployment burden. The number of unemployed in the county rose by nearly 1,200 to 4,248 in April, causing the jobless rate to rise from 8.5 percent to 11.4 percent. In Wicomico, temporary layoffs in food processing were, in large part, responsible for pushing the county's jobless rate up by more than two full percentage points to 9.5 percent in April. Unemployment in Worcester County, on the other hand, dropped from 12.0 percent to 9.1 percent as employers began to rebuild their work forces in anticipation of the upcoming tourist season. Locally, unemployment rates in the region covered a broad range, spanning from a low of 4.6 percent in Talbot County to a high of 12.4 percent in Somerset.

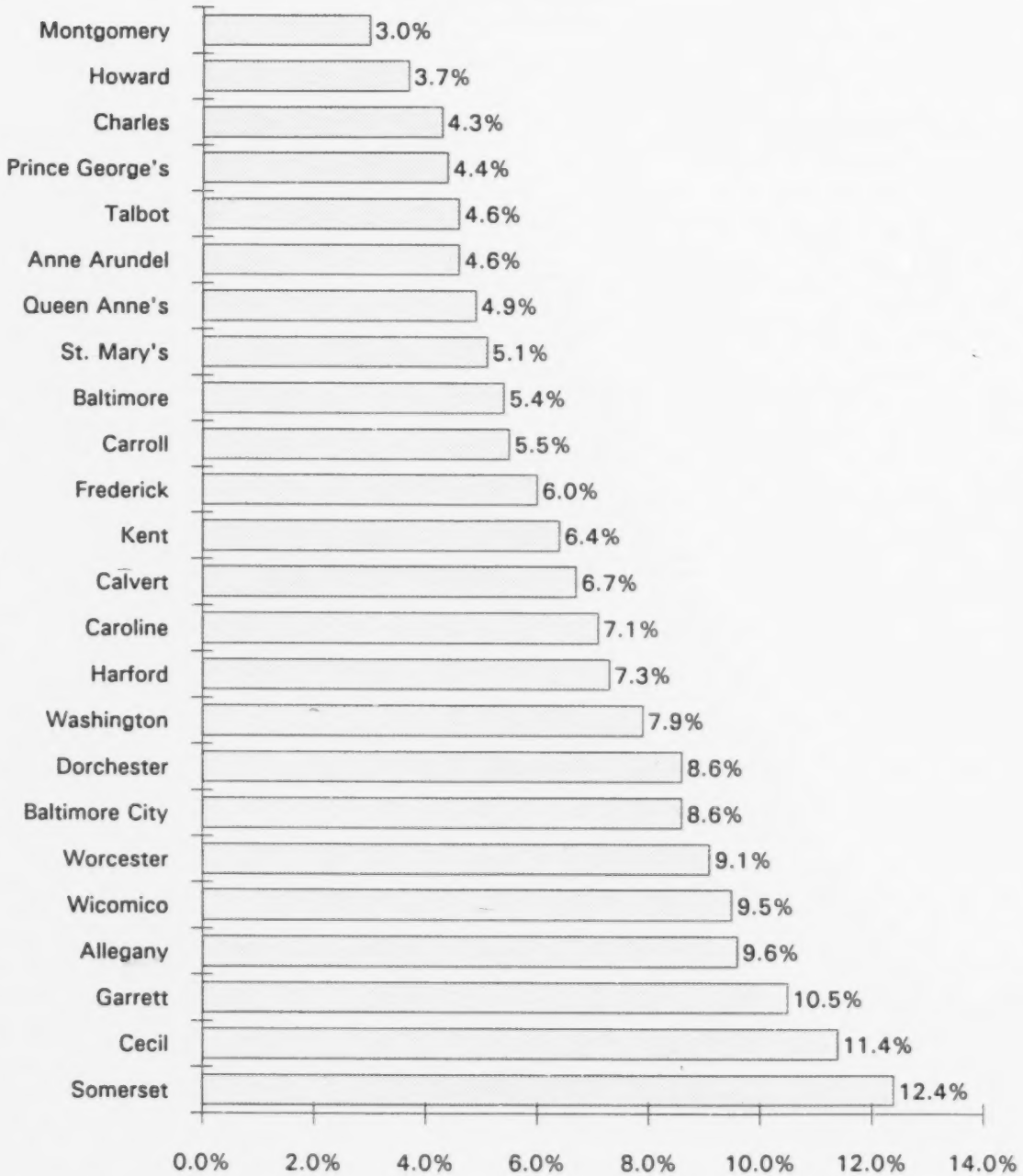
TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

	APRIL 1991		MARCH 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	141,684	5.6	149,669	6.0
BALTIMORE METROPOLITAN AREA	74,818	6.2	81,491	6.8
MARYLAND'S D.C. SUBURBS	39,515	4.0	40,833	4.1
WESTERN MARYLAND	9,563	8.8	10,498	9.8
BALANCE OF STATE	17,788	8.3	16,846	8.1

UNEMPLOYMENT RATES - APRIL 1991



LOCAL UNEMPLOYMENT RATES-APRIL 1991



MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
APRIL 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	APRIL	MARCH*	APRIL	MARCH*	APRIL	MARCH*	APRIL	MARCH*	APR.1990
MARYLAND	2,534,351	2,512,124	2,392,667	2,362,455	141,684	149,669	5.6	6.0	3.6
BALTIMORE METROPOLITAN AREA	1,215,370	1,205,913	1,140,552	1,124,422	74,818	81,491	6.2	6.8	3.9
BALTIMORE CITY	346,187	343,946	316,412	311,937	29,775	32,009	8.6	9.3	6.1
ANNE ARUNDEL	215,975	213,979	206,029	203,116	9,946	10,863	4.6	5.1	2.5
BALTIMORE	393,609	390,447	372,470	367,203	21,139	23,244	5.4	6.0	3.5
CARROLL	63,953	63,786	60,449	59,594	3,504	4,192	5.5	6.6	2.4
HARFORD	85,430	84,623	79,223	78,102	6,207	6,521	7.3	7.7	3.7
HOWARD	94,183	93,138	90,720	89,437	3,463	3,701	3.7	4.0	1.9
QUEEN ANNE'S	16,034	15,996	15,249	15,034	785	962	4.9	6.0	2.7
D. C. AREA	996,339	990,011	956,824	949,178	39,515	40,833	4.0	4.1	2.5
CALVERT	23,824	23,775	22,217	22,040	1,607	1,735	6.7	7.3	3.2
CHARLES	47,609	47,487	45,583	45,219	2,026	2,268	4.3	4.8	2.3
FREDERICK	78,302	78,442	73,637	73,049	4,665	5,393	6.0	6.9	3.0
MONTGOMERY	425,696	422,755	413,109	409,808	12,587	12,947	3.0	3.1	2.0
PRINCE GEORGE'S	420,908	417,553	402,278	399,063	18,630	18,490	4.4	4.4	3.0
WESTERN MARYLAND	108,984	107,617	99,421	97,119	9,563	10,498	8.8	9.8	5.8
ALLEGANY	33,111	32,985	29,922	29,555	3,189	3,430	9.6	10.4	6.6
GARRETT	14,039	13,682	12,564	12,086	1,475	1,596	10.5	11.7	7.6
WASHINGTON	61,834	60,950	56,935	55,478	4,899	5,472	7.9	9.0	5.0
BALANCE OF STATE	213,659	208,583	195,871	191,737	17,788	16,846	8.3	8.1	5.5
CAROLINE	14,362	14,124	13,342	12,990	1,020	1,134	7.1	8.0	4.0
CECIL	37,163	36,188	32,915	33,120	4,248	3,068	11.4	8.5	6.1
DORCHESTER	17,448	17,573	15,939	15,655	1,509	1,918	8.6	10.9	6.5
KENT	9,614	9,111	8,997	8,490	617	621	6.4	6.8	3.8
ST. MARY'S	43,145	42,763	40,929	40,360	2,216	2,403	5.1	5.6	4.0
SOMERSET	13,000	12,672	11,382	10,977	1,618	1,695	12.4	13.4	12.7
TALBOT	17,495	17,468	16,687	16,542	808	926	4.6	5.3	2.8
WICOMICO	41,008	39,805	37,120	36,989	3,888	2,816	9.5	7.1	5.3
WORCESTER	20,424	18,879	18,560	16,614	1,864	2,265	9.1	12.0	7.1
UNITED STATES**	124,727,000	124,443,000	116,678,000	115,639,000	8,049,000	8,804,000	6.5	7.1	5.2

*Estimates for the state are revised.
**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--APRIL 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	April 1991	March 1991	April 1991	March 1991	April 1991	March 1991	April 1991	March 1991
Total Nonagricultural Employment	1,146.9	1,141.3	773.7	775.4	93.5	92.4	139.7	138.2
Goods Producing	197.4	195.5	100.2	99.2	22.0	21.4	32.5	32.3
Mining	0.5	0.5	0.6	0.5	0.8	0.7	0.2	0.2
Construction	72.0	69.9	64.1	62.9	5.6	5.3	9.8	9.5
Manufacturing	124.9	125.1	35.5	35.8	15.6	15.4	22.5	22.6
Durable Goods	68.9	68.8	17.8	17.9	7.2	7.0	8.7	8.7
Nondurable Goods	56.0	56.3	17.7	17.9	8.4	8.4	13.8	13.9
Service Producing	949.5	945.8	673.5	676.2	71.5	71.0	107.2	105.9
Transportation & Public Utilities	55.8	55.5	33.9	33.9	5.2	5.1	7.1	7.3
Trade	264.6	263.0	196.3	196.2	26.2	26.1	34.6	33.9
Wholesale Trade	62.7	62.8	35.4	35.5	5.0	5.0	5.0	5.1
Retail Trade	201.9	200.2	160.9	160.7	21.2	21.1	29.6	28.8
Finance, Insurance, & Real Estate	75.3	75.3	45.6	45.7	3.2	3.2	5.0	5.0
Services	333.6	333.0	234.0	234.8	21.6	21.5	33.8	32.9
Total Government	220.2	219.0	163.7	165.6	15.3	15.1	26.7	26.8
Federal	50.5	50.5	72.8	72.9	1.8	1.8	6.8	6.8
State	74.0	73.7	17.8	18.0	5.0	4.9	5.8	5.8
Local	95.7	94.8	73.1	74.7	8.5	8.4	14.1	14.2

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	April 1991	March 1991	April 1990
Initial Claims	24,617	26,579	16,077
Weeks Claimed	367,224	346,326	155,631
First Payments	12,252	14,309	6,895
Final Payments	4,446	2,977	2,053
Weeks Paid	286,332	273,466	140,698
Net Benefit Amount	$51,256,767	$48,929,866	$19,684,752
Average Check Amount	$179.01	$178.92	$139.91

Initial claims filings continued to subside during April, falling by 1,962, or by 7.4 percent, from March's reports. Even with this decline, the current claims level is more than 50.0 percent higher than last April's tally, representing an over-the-year increase of slightly more than 8,500 in initial claims filings. While the count of initial claims dropped, the number of weeks claimed rose up from 346,326 in March to 367,224 in April. About 78.0 percent of all weekly claims filed during April resulted in compensation, with payments averaging $179.01, up slightly from March's check amount of $178.92. During April, the payment of an estimated 286,332 weekly claims cost the Unemployment Insurance Trust Fund about $51.3 million, up from $48.9 million in March.

Meanwhile, the number of exhaustions, which has been steadily declining since January, shot up by almost 50.0 percent to number 4,446 in April. About 1.6 percent of all weeks paid during April represented final payments, up from March's ratio of 1.1 percent. While final pays increased, the number of first pays dropped back by 14.4 percent to 12,252 in April. Last year, the number of initial payments also declined over the month but by a lesser 9.3 percent. Regionally, the ratio of first pays to total weeks paid was highest in the Western Region while the local offices in the Baltimore Metro Area reported the highest percentage of final pays. For those claimants receiving benefits, weekly checks were highest in the D.C. suburbs and lowest in the Eastern Shore/Southern Maryland Region.

REGIONAL INDICATORS
APRIL 1991

	BMA	DC Suburbs	Western Maryland	Balance of State
First Pays	6,391	2,742	1,261	1,092
Final Pays	2,293	976	303	475
Total Weeks Paid	149,306	64,725	23,127	29,415
Average Check Amount	$181.09	$188.49	$167.15	$149.46

Maryland
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